



Activity Guide –

PO320 – Processing Purchase
Requisitions

State of Kansas



PO320: Processing Purchase Requisitions Activity Guide

Statewide Management, Accounting and Reporting Tool



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Activity 1 - Walkthrough: Browsing Item Catalogs

Scenario

You are a **Requisitioner** for your agency. You need to purchase stocking caps, however you are not sure what stocking caps options are available in the SMART item catalog. Your goal is to browse the SMART item catalog to display the stocking caps options.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to browse item catalogs in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 - Department of Administration
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
<i>1. Define Requisition</i>	
* Click the Continue button	
<i>2. Add Items and Services: Browse Catalog</i>	
* Select a catalog:	UNSPSC ITEM CATALOG
* Click the + ALLITEMS folder button	
* Click the + 53000000 - Apparel and Luggage folder button	
* Click the + 53101702 - Mens sweaters link	
* Find and review the Stocking Cap item	
* Click the Home link	
* Click the Cancel button on the message	



Activity 2 - Walkthrough: Item Keyword Search

Scenario

You are a **Requisitioner** for your agency and the supply of plastic coil bindings is running low. It is your responsibility to reorder the coil bindings. However, you first need to locate the available options in the SMART item catalog before creating a requisition. Search the SMART item catalog by using the keywords of “coil binding” to display the available options.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to perform a keyword search for an item within the item catalogs in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
<i>1. Define Requisition</i>	
* Click the Continue button	
<i>2. Add Items and Services: Catalog – Search Catalog</i>	
Description	Plastic Coil Binding
* Click the Search button	
* Click the Home link	
* Click the Cancel button on the message	



Activity 3 - Walkthrough: Item Advanced Search

Scenario

As a **Requisitioner** for your agency, you need to purchase paper hand towels supplied by the vendor Mike General Store. Perform an advanced search in the SMART item catalog by entering the keywords of “hand towel”, and the vendor name of “Mike General Store” to locate the correct paper hand towels.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to perform advanced search options for items within the item catalogs in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
<i>1. Define Requisition</i>	
* Click the 2. Add Items and Services page link	
<i>2. Add Items and Services: Catalog – Search Catalog</i>	
Description	Paper hand towels
Vendor	Mike General Store
* Click the Search button	
Vendor	* Delete: Mike General Store
* Click the Search button	
* Click the Home link	
* Click the Cancel button on the message	



Activity 4 - Walkthrough: Side By Side Comparison for Items

Scenario

You are a **Requisitioner** for your agency and your Supervisor has asked you to research the cost for a new United States flag for your agency's flagpole. Use a 'compare selected' item search of the item catalogs in SMART, to research and compare prices of United States flags.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to perform a compare search of items within the item catalogs in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data", be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
<i>1. Define Requisition</i>	
* Click the Continue button	
<i>2. Add Items and Services – Catalog – Search Catalog</i>	
Description	United States Flag
* Click the Search button	
<i>2. Add Items and Services – Catalog – Search Results</i>	
* Select the item checkbox for the first United States flag shown in the list	
* Select the item checkbox for the second United States flag shown in the list	
* Click the Compare Button	
* Click the Home link	
* Click the Cancel button on the message	



Activity 5 - Challenge: Item Keyword Search

Scenario

You are a **Requisitioner** for your agency and you need to order work gloves for your facility. Use the key words of “work glove” to research the available work glove options.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR – Ceasar Contact
* Click the OK button	
<i>1. Define Requisition</i>	
* Click the 2. Add Items and Services page link	
<i>2. Add Items and Services – Catalog – Search Catalog</i>	
Description	Work glove
* Click the Search button	
* Click the Item Description link	
* Record the Item ID here: _____	
* Record the Location street address here: _____	
* Click the Return to Previous Page link	
* Click the Home link	
* Click the Cancel button on the message	



Activity 6 - Exercise: Creating Requisitions Using Procurement Cards

Scenario

You are a **Requisitioner** for your agency, which has received a major donation for a special scope project. Congratulations! To handle the workload, you need to hire three new employees. Your Supervisor requests that you order three new computer monitors for the new staff members. You need to create a purchase requisition for three computer monitors in SMART using an item from the item master list, and using a procurement card to pay for the purchase.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Creating Requisitions Using Procurement Cards

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	FMSKHAFNER – Kurt Hafner
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services – Catalog</i>	
Item ID	000000000000000006 (Computer Monitor)
* Click the Search button	
* Select the item checkbox for the item	
Quantity	* Double click in field and enter ‘3’
* Click the Add button	
* Click the Review and Submit link	



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Field	Value
<i>3. Review and Submit – Header</i>	
Card Number	*****4478 (VISA)
* Click the - button to collapse the left menu pagelet	
<i>3. Review and Submit – Requisition Lines</i>	
* Click the Expand Section button for requisition Line 1	
<i>3. Review and Submit – Requisition Lines – Accounting Lines – Chartfields 1</i>	
Department	1730101010 - Administration
Fund	1000 - State General Fund
Budget Unit	0210
Program	01031 - Administration
Account	Double left mouse click in the field and enter: 523600 – (Computer Equipment Rental), then press the Enter key
<i>3. Review and Submit – Justification/Comments</i>	
Justification/Comments	Computer monitors for new hires starting 07-15-10: Janie Brick, Peter Johnson, and Mark Pillshun.
* Click the Home link	
* Click the Cancel button on the message	



Activity 7 - Walkthrough: Creating a Purchase Requisition Using a Special Request for Items

Scenario

You are a **Requisitioner** for your agency. The agency has formed a committee to organize a “SMART” celebration. The committee chairperson has requested that you order silk-screened sweatshirts for the committee members running the event. Create a new purchase requisition in SMART without a procurement card, using a SpeedChart for a special request item.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to create a purchase requisition for a special request item in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
<i>1. Define Requisition</i>	
* Click the Continue button	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Item Description	Silk Screened Sweatshirts
Price	12.00
Quantity	15
Unit of Measure	EA
Category	* Click the Category Lookup button
<i>Look Up Category</i>	



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Field	Value
* Click the Browse Category Tree expand section button	
* Select a catalog	UNSPSC ITEM
* Click the + ALLITEMS folder button	
* Click the + 53000000 - Apparel and Luggage folder button	
* Click the + 53101702 - Mens sweaters link	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Due Date	Enter date (two weeks from today's date. <i>Quick Tip:</i> Use calendar button)
Vendor ID	0000000001 – Mom Design Shop
Additional Information	Silk Screen with Agency Logo on left chest
* Select the Send to Vendor checkbox	
* Click the Add Item button	
* Click the 3. Review and Submit page link	
<i>3. Review and Submit</i>	
* Click the – button to collapse the left menu pagelet	
* Click the Requisition Lines Expand Section button for Line 1	
Speed chart	Enter SMARTCOMIT and press the Enter key
<i>3. Review and Submit: Chartfields 1</i>	
Line1 – Quantity	4
Line2 – Quantity	5
Line3 – Quantity	6
Line 1 – Account	Enter 529700 and press the Enter key
Line 2 – Account	Enter 529700 and press the Enter key
Line 3 – Account	Enter 529700 and press the Enter key
<i>3. Review and Submit – Justification/Comment</i>	
Justification/Comments	Committee Chair sweatshirts for SMART Event.
* Click the Home link	
* Click the Cancel button on the message	



Activity 8 - Walkthrough: Create a Purchase Requisition for a Fixed Asset Item

Scenario

Your agency has identified a need for a new forklift to move pallets within the warehouse. The Agency Director has approved the purchase of a new forklift. In this scenario, you are a **Requisitioner** and you need to create a new purchase requisition with asset details for the forklift in SMART. You also need to modify the Ship To address for the delivery of the forklift on the requisition line.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to create a purchase requisition for a fixed asset item in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
<i>1. Define Requisition</i>	
* Click the Continue button	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Item Description	Forklift
Price	1025.00
Quantity	1
Unit of Measure	EA
Category	* Click the Category Lookup button
<i>Look Up Category</i>	



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Field	Value
* Click the Browse Category Tree expand section button	
* Select a catalog	UNSPSC ITEM
* Click the + ALLITEMS folder button	
* Click the + 24000000 - Material Handling a folder button	
* Click the + 24100000 - Material handling m link	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Due Date	Enter date (two weeks from today's date. <i>Quick Tip:</i> Use calendar button)
Vendor ID	0000000085 – Thomas Tires Shop
* Click the Add Item button	
* Click the 3. Review and Submit page link	
<i>3. Review and Submit: Requisition Lines</i>	
* Click the – button to collapse the left menu pagelet	
* Click the Line selection checkbox for Line 1	
* Click the Requisition Lines Expand Section button for Line 1	
* Click the Modify Line / Shipping / Accounting button	
<i>Modify Line / Shipping / Accounting</i>	
* Click the Modify Shipping Address link	
<i>Shipping Address</i>	
Address 1	My Agency Warehouse
Address 2	123 Main Street
Address 3	Receiving Dock B
City	Topeka
County	Shawnee
Postal	66612
State	KS
Phone	785-222-4466
* Click the OK button	
<i>Modify Line / Shipping / Accounting - Accounting Lines – Asset Information</i>	
AM Business Unit	17300 – Department of Administration
Profile ID	540800 – Shop and Plant Maint Equip
* Click the Apply button	
<i>Distribution Change Options</i>	
* Accept the default value of All Distribution Lines	
* Click the OK button	
<i>3. Review and Submit: Justification/Comments</i>	
Justification/Comments	Forklift for use at warehouse 1.
* Click the Home link	
* Click the Cancel button on the message	



Activity 9 - Walkthrough: Create a Purchase Requisition for a Project Item

Scenario

The Governor of the State of Kansas has chosen your agency to conduct a special scope project. In order to facilitate the program, your agency needs to purchase four copies of Adobe Acrobat Pro software. Your Supervisor asks you to create a requisition in SMART to order the software required for the project. As the Agency **Requisitioner** you need to create a new requisition in SMART, and add project information, line comments, and contract information to the requisition.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to create a purchase requisition for a project item in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Description	Adobe Acrobat Pro Software 9.0
Price	125.00
Quantity	4
Unit of Measure	EA
Category	* Click the Category Lookup button
<i>Look Up Category</i>	



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Field	Value
* Click the Browse Category Tree expand section button	
* Select a catalog	UNSPSC ITEM
* Click the + ALLITEMS folder button	
* Click the + 53000000 - Apparel and Luggage folder button	
* Click the + 55121715 - Flags or accessorie link	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Due Date	Enter date (two weeks from today's date. <i>Quick Tip:</i> Use calendar button)
Vendor ID	0000000001 – Mom Design Shop
* Click the Add Item button	
* Click the 3. Review and Submit page link	
<i>3. Review and Submit</i>	
* Click the Collapse Menu button	
<i>3. Review and Submit: Requisition Lines</i>	
* Click the Line Selection checkbox for Requisition Line 1	
* Click the Expand Section button for Requisition Line 1	
<i>3. Review and Submit: Requisition Lines – Accounting Lines – Chartfields1</i>	
Department	1730101010 - Administration
Fund	1000 - State General Fund
Budget Unit	0210
Program	01031 - Administration
PC Bus Unit	17300
Project	PROJ_SPOTLIGHT (Project Spotlight)
Activity	COMP_TRAINING (Computer Training)
Source Type	TRAVL – Travel/Training
* Click the Line Comments button for Requisition Line 1	
<i>Line Comments</i>	
Comments text box	Software to be distributed, with one copy to each of the following staff members: Angela Sinclair, Donnita Hereck, Jerry Boulain, and Kurt Hessen.
* Click the OK button	
<i>3. Review and Submit</i>	
* Click the Line Details button	
<i>Line Details</i>	
* Click the Contract expand section button	
Contract ID	000000000000000001
* Click the OK button	



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Field	Value
<i>3. Review and Submit (Split Schedule/Distribution)</i>	
Shipping Line: 1	* Click the + button
Shipping Line: 2	* Click the + button
Shipping Line: 3	* Click the + button
Shipping Line: 1 – Quantity	Enter ‘1’ and press the Enter key
Shipping Line: 2 – Quantity	Enter ‘1’ and press the Enter key
Shipping Line: 3 – Quantity	Enter ‘1’ and press the Enter key
Shipping Line: 4 – Quantity	Enter ‘1’ and press the Enter key
Shipping Line: 1 – Ship To	Enter ‘039002’ and press the Enter key
Shipping Line: 2 – Ship To	Enter ‘034GTC’ and press the Enter key
Shipping Line: 3 – Ship To	Enter ‘034SCC’ and press the Enter key
Shipping Line: 4 – Ship To	Enter ‘039001’ and press the Enter key
* Click the Modify Line / Shipping / Accounting button	
<i>Modify Line / Shipping / Accounting - Accounting Lines – Chartfields1</i>	
Account	Enter ‘523700’ and press the Enter key
* Click the Apply button	
<i>Distribution Change Options</i>	
* Accept the default value of All Distribution Lines	
* Click the OK button	
<i>3. Review and Submit: Justification/Comments</i>	
* Review the Account code for all distribution lines	
Justification/Comments	To be used for “Project Spotlight”.
* Click the Home link	
* Click the Cancel button on the message	



Activity 10 - Walkthrough: Creating a Purchase Requisition That References a Prior Authorization Request

Scenario

You are a **Requisitioner** for the State of Kansas Highway Patrol. The State of Kansas Highway Patrol needs to purchase new tazers. There is only one vendor in the United States that sells the brand of tazers that the Kansas Highway Patrol needs to purchase. The Agency Director instructed you to submit a Prior Authorization Request to the Central Division of Purchases for the purchase of the tazers. As the **Requisitioner** for the State of Kansas Highway Patrol, you need to create a requisition in SMART that references the Prior Authorization Request.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to create a purchase requisition in SMART that references a Prior Authorization Request. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	28000 - Kansas Highway Patrol
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Description	Tazer ZX350
Price	325.00
Quantity	10
Unit of Measure	EA
Category	* Click the Category Lookup button
<i>Look Up Category</i>	



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Field	Value
* Click the Browse Category Tree expand section button	
* Select a catalog	UNSPSC ITEM
* Click the + ALLITEMS folder button	
* Click the + 26000000 - Power Generation an folder button	
* Click the + 26110000 - Batteries and gener link	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Vendor ID	0000000074 – Ojo Supplies Shop
Additional Information	Includes belt holster
* Click the Add Item button	
* Click the 3. Review and Submit page link	
<i>3. Review and Submit – Requisition Lines</i>	
* Click the – button to collapse the left menu pagelet	
* Select the Requisition Line 1 selection checkbox	
Click the Expand Section button for Requisition Line 1	
<i>3. Review and Submit – Requisition Lines – Accounting Lines – Chartfields1</i>	
Department	1736010000 - Purchases
Fund	2017 – Purchasing FF
Budget Unit	0210
Program	01610 - Purchasing
<i>Requisition Lines (Expand) – Line Details (Split Schedule/Distribution)</i>	
Shipping Line: 1	* Click the + button
Shipping Line: 2	* Click the + button
Shipping Line: 1 – Quantity	Enter '3' and press the Enter key
Shipping Line: 2 – Quantity	Enter '2' and press the Enter key
Shipping Line: 3 – Quantity	Enter '5' and press the Enter key
Shipping Line: 1 – Ship To	Enter '034WIS' and press the Enter key
Shipping Line: 2 – Ship To	Enter '034COF' and press the Enter key
Shipping Line: 3 – Ship To	Enter '034GDN' and press the Enter key
Shipping Line: 1 – Account	Enter '529900' and press the Enter key
Shipping Line: 2 – Account	Enter '529900' and press the Enter key
Shipping Line: 3 – Account	Enter '529900' and press the Enter key
Justifications/Comment	Researched vendors. This vendor is the only known provider for this item.
Prior Auth	OKP (Only Known Provider)
* Click the Home link and then click the Cancel button on the message	



Activity 11 – Walkthrough: Editing, Saving, and Submitting Requisitions

Scenario

You are a **Requisitioner** for your agency. After entering a requisition for two new office printers, you receive an email from your Supervisor asking you to change the requisition from two printers to only one printer. You need to use the Manage Requisitions page in SMART to lookup, edit, save, and submit the existing purchase requisition.

Menu Path

eProcurement → Manage Requisitions

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to edit, save, and submit a purchase requisition in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require “user specific data”, be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
<i>Manage Requisitions</i>	
* Collapse the left menu pagelet using the - button	
Business Unit	17300 (Department of Administration)
Requisition ID	User specific data
Request Status	<Remove default value from field>
Date From	<Remove default value from field>
Date To	<Remove default value from field>
* Click the Search button	
* Click the Req ID link	
<i>Requisition Details</i>	
* Click the Edit Requisition button	
<i>Edit Requisition – 3. Review and Submit</i>	
* Double click in the Quantity field	
* Click the Delete key	

Quantity	1
* Click the Save & preview approvals button	
* Message appears	
* Click the OK button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending	
* Click the Home link	

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	Requisition ID	0000000007
User 2	Requisition ID	0000000008
User 3	Requisition ID	0000000009
User 4	Requisition ID	0000000010
User 5	Requisition ID	0000000011
User 6	Requisition ID	0000000012
User 7	Requisition ID	0000000013
User 8	Requisition ID	0000000014
User 9	Requisition ID	0000000015
User 10	Requisition ID	0000000016
User 11	Requisition ID	0000000017
User 12	Requisition ID	0000000018
User 13	Requisition ID	0000000019
User 14	Requisition ID	0000000020
User 15	Requisition ID	0000000021
User 16	Requisition ID	0000000022
User 17	Requisition ID	0000000023
User 18	Requisition ID	0000000024
User 19	Requisition ID	0000000025
User 20	Requisition ID	0000000026
User 21	Requisition ID	0000000027
User 22	Requisition ID	0000000028

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	Requisition ID	0000000032
User 2	Requisition ID	0000000033
User 3	Requisition ID	0000000034
User 4	Requisition ID	0000000035
User 5	Requisition ID	0000000037



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User ID	Field	Value
User 6	Requisition ID	0000000038
User 7	Requisition ID	0000000039
User 8	Requisition ID	0000000040
User 9	Requisition ID	0000000041
User 10	Requisition ID	0000000042
User 11	Requisition ID	0000000043
User 12	Requisition ID	0000000044
User 13	Requisition ID	0000000045
User 14	Requisition ID	0000000046
User 15	Requisition ID	0000000047
User 16	Requisition ID	0000000048
User 17	Requisition ID	0000000049
User 18	Requisition ID	0000000050
User 19	Requisition ID	0000000051
User 20	Requisition ID	0000000052
User 21	Requisition ID	0000000053
User 22	Requisition ID	0000000054

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	Requisition ID	0000000058
User 2	Requisition ID	0000000059
User 3	Requisition ID	0000000060
User 4	Requisition ID	0000000061
User 5	Requisition ID	0000000062
User 6	Requisition ID	0000000063
User 7	Requisition ID	0000000064
User 8	Requisition ID	0000000065
User 9	Requisition ID	0000000066
User 10	Requisition ID	0000000067
User 11	Requisition ID	0000000068
User 12	Requisition ID	0000000069
User 13	Requisition ID	0000000070
User 14	Requisition ID	0000000071
User 15	Requisition ID	0000000072
User 16	Requisition ID	0000000073
User 17	Requisition ID	0000000074
User 18	Requisition ID	0000000075
User 19	Requisition ID	0000000076
User 20	Requisition ID	0000000077



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User ID	Field	Value
User 21	Requisition ID	0000000078
User 22	Requisition ID	0000000079



Activity 12 - Exercise: Using the Manage Requisitions Page in SMART

Scenario

As a **Requisitioner** for your agency, you use the Manage Requisitions page in SMART to locate and edit existing purchase requisitions. In this scenario, you have received an email from your Supervisor asking you to increase the quantity of items by ten on a purchase requisition you just created. Use the Manage Requisitions page in SMART to locate and update the existing purchase requisition.

Menu Path

eProcurement → Manage Requisitions

UPK Procedure

Managing Requisitions

Job Aid

Not applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data”, be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>Manage Requisitions – Search Requisitions</i>	
* Collapse the left menu pagelet using the - button	
Business Unit	17300 (Department of Administration)
Requisition ID	User specific data
Request Status	Change to blank (use drop-down list)
Date From	<Remove default value from field>
Date To	<Remove default value from field>
* Click the Search button	
* Click the Req ID link	
<i>Requisition Details</i>	
* Click the Edit Requisition button	
<i>Edit Requisition – 3. Review and Submit</i>	
* Double click in the Quantity field	
* Click the Delete key	



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Quantity	12
* Click the Save & preview approvals button	
* Message appears, review message, and click the OK button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending	
* Click the Home link	

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	Requisition ID	0000000085
User 2	Requisition ID	0000000086
User 3	Requisition ID	0000000087
User 4	Requisition ID	0000000088
User 5	Requisition ID	0000000089
User 6	Requisition ID	0000000090
User 7	Requisition ID	0000000091
User 8	Requisition ID	0000000092
User 9	Requisition ID	0000000093
User 10	Requisition ID	0000000094
User 11	Requisition ID	0000000095
User 12	Requisition ID	0000000096
User 13	Requisition ID	0000000097
User 14	Requisition ID	0000000098
User 15	Requisition ID	0000000099
User 16	Requisition ID	0000000100
User 17	Requisition ID	0000000101
User 18	Requisition ID	0000000102
User 19	Requisition ID	0000000103
User 20	Requisition ID	0000000104
User 21	Requisition ID	0000000105
User 22	Requisition ID	0000000106

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	Requisition ID	0000000107
User 2	Requisition ID	0000000108
User 3	Requisition ID	0000000109
User 4	Requisition ID	0000000110
User 5	Requisition ID	0000000111
User 6	Requisition ID	0000000112



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User ID	Field	Value
User 7	Requisition ID	0000000113
User 8	Requisition ID	0000000114
User 9	Requisition ID	0000000115
User 10	Requisition ID	0000000116
User 11	Requisition ID	0000000117
User 12	Requisition ID	0000000118
User 13	Requisition ID	0000000119
User 14	Requisition ID	0000000120
User 15	Requisition ID	0000000121
User 16	Requisition ID	0000000123
User 17	Requisition ID	0000000124
User 18	Requisition ID	0000000125
User 19	Requisition ID	0000000126
User 20	Requisition ID	0000000127
User 21	Requisition ID	0000000128
User 22	Requisition ID	0000000129

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	Requisition ID	0000000130
User 2	Requisition ID	0000000131
User 3	Requisition ID	0000000132
User 4	Requisition ID	0000000133
User 5	Requisition ID	0000000134
User 6	Requisition ID	0000000135
User 7	Requisition ID	0000000136
User 8	Requisition ID	0000000137
User 9	Requisition ID	0000000138
User 10	Requisition ID	0000000139
User 11	Requisition ID	0000000140
User 12	Requisition ID	0000000141
User 13	Requisition ID	0000000142
User 14	Requisition ID	0000000143
User 15	Requisition ID	0000000144
User 16	Requisition ID	0000000145
User 17	Requisition ID	0000000146
User 18	Requisition ID	0000000147
User 19	Requisition ID	0000000148
User 20	Requisition ID	0000000149
User 21	Requisition ID	0000000150

User ID	Field	Value
User 22	Requisition ID	0000000151

Activity 13 - Demonstration: Favorite Items

Scenario

As a **Requisitioner** for your agency, you are frequently asked to order bags of snow melt for snow and ice removal. To save time and increase your efficiency, you decide to create a favorite item to enable you to add the item to future requisitions without having to use the item catalog each time you create a new requisition. For this scenario, you need to create a new purchase requisition and add the snow melt item to your Favorite Items.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Watch your instructor as he/she demonstrates how to create a favorite item in SMART. Do NOT perform this exercise along with your instructor.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Description	Bags of snow melt <insert Classroom number. User ID number>
Price	18.95
Quantity	16
Unit of Measure	BG - Bags
<i>Look Up Category</i>	
* Click the Browse Category Tree expand section button	
* Select a catalog	UNSPSC ITEM
* Click the + ALLITEMS folder button	
* Click the + 12000000 - Chemicals including folder button	
* Click the + 12190000 - Solvents link	



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Field	Value
<i>2. Add Items and Services – Special Request – Special Item</i>	
Vendor ID	0000000074 – Ojo Supplies Shop
* Click the Add Item button	
* Click the Review and Submit page link	
<i>3. Review and Submit</i>	
* Select the Line 1 checkbox	
* Click the Add to Favorites button – opens message window	
* Review confirmation message and click the Close button	
<i>3. Review and Submit</i>	
Justifications/Comment	Bags of snow melt to be used for agency grounds care and maintenance due to severe winter weather.
* Click the Save & preview approvals button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending	
* Click the Home link	



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Activity 14 – Exercise: Create a Requisition Using a Favorite Item

Scenario

As a **Requisitioner** for your agency, you frequently purchase toilet paper rolls for your facility. Last time you ordered the toilet paper rolls, you added them to the Favorite Item list. Now you need to create a new requisition in SMART using the Favorite item of toilet paper rolls.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Use the appropriate following table to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services - Favorites</i>	
* Click the Expand Section Button for the Toilet Paper line (if not expanded)	
* Select the line selection checkbox	
* Click in the Quantity field	
Quantity	10
* Click the Add Item button	
* Click the Review and Submit page link	
<i>3. Review and Submit</i>	
* Click the – button to collapse the left menu pagelet	
* Select the Line 1 checkbox	



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Field	Value
* Click the Expand Section button for Requisition Line 1	
<i>3. Review and Submit – Requisition Lines – Accounting Lines – Chartfields1</i>	
Department	1730101010 - Administration
Fund	1000 - State General Fund
Budget Unit	0210
Program	01031 - Administration
Account	539200 – Household Supplies
<i>3. Review and Submit – Justification/Comments</i>	
Justification/Comments	Replenish agency janitorial supplies
* Click the Save & preview approvals button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending	
* Click the Home link	

Activity 15 - Demonstration: Personal Templates

Scenario

Your agency has a tendency to order a computer, monitor, and wireless mouse at the same time for new hire employees. As a **Requisitioner** for your agency, you want to improve your efficiency and make your job a little easier. You decide to create a personal template for these frequently ordered items. You need to create a requisition in SMART and create a personal template for the abovementioned items.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Watch your instructor as he/she demonstrates how to create a personal template in SMART. Do NOT perform this exercise along with your instructor.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Cesar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services - Catalog</i>	
Item ID	000000000000000021 - Computer
* Click the Search button	
* Double click in the Quantity field	
* Press the Delete key (to remove existing quantity)	
Quantity	3
* Click the Add button	
Item ID	Computer Monitor - 000000000000000006
* Click the Search button	
* Double click in the Quantity field	
* Press the Delete key (to remove existing quantity)	
Quantity	3



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Field	Value
* Click the Add button	
Item ID	000000000000000022 - Wireless Mouse
* Click the Search button	
* Double click in the Quantity field	
* Press the Delete key (to remove existing quantity)	
Quantity	3
* Click the Add button	
* Click the Review and Submit page link	
<i>3. Review and Submit</i>	
* Click the – button to collapse the left menu pagelet	
* Select the Line 1, Line 2 and Line 3 checkboxes	
* Click the Add to Template(s) button	
<i>Add Selected Items to Template(s)</i>	
Template Name	New Hire <insert Classroom number . User ID number>
Description	Computer, Monitor & Wireless Mouse
* Click the OK button	
* Click the Modify Line /Shipping / Accounting button and change the distribution for all 3 lines (simultaneously)	
<i>Modify Line / Shipping / Accounting – Chartfields1</i>	
Department	1730101010 - Administration
Fund	1000 - State General Fund
Budget Unit	0210
Program	01031 - Administration
Account	523600 – Computer Equipment Rental
* Click the Apply button	
<i>Distribution Change Options</i>	
* Accept the default value of All Distribution Lines	
* Click the OK button	
<i>3. Review and Submit – Justification/Comments</i>	
Justification/Comments	Equipment for three new hires starting <insert date – two weeks from today's date> xx/xx/xxxx: Harold Wolnick, Mary Jane Bethel, and Samantha Truong.
* Click the Save & preview approvals button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending and click the Home link	

Activity 16 – Exercise: Using a Personal Template

Scenario

As a **Requisitioner** for your agency, you have ordered workstation and PC set ups for new hires on three different occasions this year. Your agency is hiring two new employees who require PC's to be set up. You demonstrate initiative and efficiency by using a personal template to create the purchase requisition in SMART.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data”, be sure to use **ONLY** the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services - Template</i>	
* Click the Expand Section button for the personal template: New Hire <Your Classroom number . Your User ID number>	
* Review the contents of the personal template	
* Click in the Quantity field	
Quantity	1
* Click the Add button	
* Click the Review and Submit page link	
<i>3. Review and Submit</i>	
* Click the – button to collapse the left menu pagelet	
Quantity – Requisition Line 1	2



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Field	Value
Quantity – Requisition Line 2	2
Quantity – Requisition Line 3	2
* Select the Line 1 and Line 3 line selection checkboxes	
* Click the Modify Line /Shipping / Accounting button and change the distribution for Lines 1 and 3	
<i>Modify Line / Shipping / Accounting – Chartfields1</i>	
Department	1730101010 - Administration
Fund	1000 - State General Fund
Budget Unit	0210
Program	01031 - Administration
Account	523600 – Computer Equipment Rental
* Click the Apply button	
<i>Distribution Change Options</i>	
* Accept the default value of All Distribution Lines	
* Click the OK button	
<i>3. Review and Submit</i>	
* Review the Distribution information for all requisition lines (using Expand Section buttons for each Requisition Line)	
Justification/Comments	Equipment for two new hires starting <insert date – two weeks from today's date> xx/xx/xxxx: Sarah Vitriani and Juan Lopez.
* Click the Save & preview approvals button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending	
* Click the Home link	



Activity 17 – Exercise: Create a Special Request for a Fixed Cost Service

Scenario

You are a **Requisitioner** for your agency and your Supervisor has asked you to create a purchase requisition for refuse collection services. You have researched the item master list, and have verified that the refuse collection services you need do not exist in any of the item catalogs in SMART. You need to create a special request for refuse collection services in SMART.

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data”, be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Ceasar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services – Special Request – Fixed Cost Service</i>	
Service Description	Monthly refuse collection service
Value of Service	185.00 (per month)
* Click the Lookup Category button	
<i>Look Up Category</i>	
* Click the Browse Category Tree expand section button	
* Select a catalog	UNSPSC ITEM
* Click the + ALLITEMS folder button	
* Click the + 24000000 – Material Handling a folder button	



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Field	Value
* Click the + 24100000 – Material Handling m link	
Vendor	0000000070 – Beth Supplies Shop
Start Date	07-21-2010
End Date	07-20-2011
Quote Number	54985
Quote Date	06-30-2010
Additional Information	Service provided for two dumpsters
* Select the Send to Vendor checkbox	
* Click the Add Service button	
* Click the Review and Submit page link	
<i>3. Review and Submit</i>	
* Click the – button to collapse the left menu pagelet	
* Click the Expand Section button for Requisition Line 1	
<i>3. Review and Submit – Requisition Lines – Accounting Lines – Chartfields1</i>	
Department	1730101010 - Administration
Fund	1000 - State General Fund
Budget Unit	0210
Program	01031 - Administration
Account	529900 – Other Contractual Services
<i>3. Review and Submit</i>	
Quantity	12
Justifications/Comment	Monthly refuse collection service for two dumpsters.
* Click the Save & preview approvals button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending	
* Click the Home link	

Discussion point:

- Quantity entered is 12 months
- Price entered is \$185 per month
- Total Amount on requisition is \$2220.00
(12 months x \$185 per month = \$2220 Total)
- Partial payments of \$185 per month will be made from the purchase order.



Activity 18 - Challenge: Processing Purchase Requisitions in SMART

Scenario

You are a **Requisitioner** for your agency. Your Supervisor has asked you to create a requisition for 13 cocktail tables and linens (tablecloths) that will be used in an annual celebration honoring Kansas farmers and their produce. You need to create a requisition in SMART for:

- 13 tablecloths from the item master table
- Add a special request item for 13 cocktail tables
- Create a personal template

Menu Path

eProcurement → Create Requisition

UPK Procedure

Not Applicable

Job Aid

Not applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require “user specific data”, be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
<i>Specify Business Unit and Requester</i>	
Business Unit	17300 (Department of Administration)
Requester	CEASAR - Contact,Cesar
* Click the OK button	
* Click the Continue button	
<i>2. Add Items and Services - Catalog</i>	
Item ID	000000000000000012 – Tablecloth – Linen, Gray, 54” x 60”
* Click the Search button	
* Double click in the Quantity field	
* Press the Delete key (to remove existing quantity)	



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Field	Value
Quantity	13
* Click the Add button	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Item Description	Solid Oak, Cocktail Table
Price	100.00
Quantity	13
Unit of Measure	EA
Category	* Click the Category Lookup button
<i>Look Up Category</i>	
* Click the Browse Category Tree expand section button	
* Select a catalog	UNSPSC ITEM
* Click the + ALLITEMS folder button	
* Click the + 53000000 - Apparel and Luggage folder button	
* Click the + 52120000 – Bedclothes and tabl folder button	
* Click the + 52121600 – Table and Kitchen I folder button	
* Click the + 52121604 – Table Cloths link	
<i>2. Add Items and Services – Special Request – Special Item</i>	
Due Date	Enter date (two weeks from today's date. <i>Quick Tip:</i> Use calendar button)
Vendor ID	0000000113 – Andy General Store
Vendor Item ID	587941-02
* Click the Add Item button	
* Click the 3. Review and Submit page link	
<i>3. Review and Submit</i>	
* Click the – button to collapse the left menu pagelet	
* Select the Line 1 and Line 2 checkboxes	
* Click the Add to Template(s) button	
<i>Add Selected Items to Template(s)</i>	
Template Name	Annual Farmers Banquet <Insert Your Classroom number . Your User ID number>
Description	Cocktail tables and tablecloths
* Click the OK button	
<i>3. Review and Submit</i>	
* Click the Expand Section Button for Line 2	
<i>3. Review and Submit - Requisition Lines – Accounting Lines – Chartfields1</i>	
Department	1730101010 - Administration
Fund	1000 - State General Fund
Budget Unit	0210
Program	01031 - Administration



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Field	Value
Account	523300 – Equipment Rental
<i>3. Review and Submit – Justification/Comments</i>	
Justification/Comments	Cocktail tables and tablecloths for Annual Farmer's Banquet.
* Click the Save & preview approvals button	
<i>Confirmation Page</i>	
* Review Approval Status = Not Routed	
* Click the Submit button	
* Review Approval Status = Pending	
* Click the Home link	
* Click the Sign Out link	